Data Collection Form Status Report

Annual program assessment is documented in AEFIS through the Data Collection solution. This is a form-based solution that allows academic and academic/student support and administrative unit users to document and submit their annual assessment plans and reports through a multi-step, feedback-based workflow.

The Data Collection Form Status Report is a report generated by Assessment Liaisons (Academic and Support) and OIE&E showing where in the workflow assessment forms are within a given data collection schedule (i.e., assessment cycle).

Follow the instructions below to generate the Data Collection Form Status Report.

INSTRUCTIONS

1. Log in to AEFIS using your NetID and password: [https://tamu.aefis.net](https://tamu.aefis.net).

2. Close the Action Items list and click on the “hamburger” menu icon in the top left corner of the screen in the blue bar.

3. Toward the bottom of the list under Analytics, select Report Dashboard.

4. Scroll down to the bottom of the page to locate the Data Collection Reports section. Select Data Collection Form Status Report.

![AEFIS Dashboard]

Please be aware that improvements are being made to this report. In the meantime, the report is functional and we encourage its use for purposes of tracking assessment forms. Go to the end of this document to see the improvements that are in progress.

5. For Status, select In Progress.

6. For Data Collection Form Type, select Program (this should be selected for Support Units/Divisions, too).
7. For **Data Collection**, select the in-progress Assessment Cycle on which you wish to run a status report.

   Please note that 20-21 **support unit assessment** is split up into two data collection schedules—one for units with an internal liaison who provides internal feedback [Support Unit Assessment (w/ Liaison)] and one for units that submit Plans and Reports directly to OIE&E (Support Unit Assessment). Ensure that you are selecting the appropriate data collection schedule.

8. For **Participant**, click to select the program(s)/unit(s) you wish to include in the status report. Note that you can search by keyword. Selected program(s)/unit(s) are indicated by a black check mark on the right side of the list.

9. Run the report.

**UNDERSTANDING THE REPORT**

*Column Definitions*

<table>
<thead>
<tr>
<th>Participant</th>
<th>Indicates the program/unit name and code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Step</td>
<td>Which step of the selected data collection/workflow the form is currently at</td>
</tr>
<tr>
<td>Current Owner</td>
<td>This column may be blank as it pertains to a previous version of the report--DISREGARD</td>
</tr>
<tr>
<td>Last Updated Date</td>
<td>Date on which the last updates were saved in the form. This may refer to changes saved by the Program Coordinator or feedback provided by Liaisons or OIE&amp;E.</td>
</tr>
<tr>
<td>Previous Step</td>
<td>Previous step the form was at in the workflow before it was submitted. If the Previous Step indicates a later step in the workflow (i.e., Step 6, and the form is currently at Step 5), this means the form was rejected.</td>
</tr>
<tr>
<td>Previous Owner</td>
<td>The last person to submit the form (either Approve or Reject)</td>
</tr>
<tr>
<td>Submitted Date</td>
<td>Date on which the form was submitted to the Current Step</td>
</tr>
<tr>
<td>Next Task</td>
<td>The next step in the workflow should the form be “Approved” at the Current Step</td>
</tr>
</tbody>
</table>
EXPORTING THE REPORT

Above the generated report, click the Export button:

⚠️ If you wish to Print the status report, we recommend exporting to PDF, Excel, or CSV first. Otherwise some of the columns will be left off of the final document.

IMPROVEMENTS (IN PROGRESS)

- The *Participants* parameter currently lists ALL academic programs and support units. In a future version of this report, *only* the programs within the Liaison’s college or division will appear in this list. (E.g., The Liaison for the College of Agriculture & Life Sciences will only see AGLS programs in the *Participants* list.)

- Within the *Participants* parameter you will be able to “Select All” or “Deselect All”.

- A *Department* parameter will be added.